



State of Louisiana
Division of Administration
Office of State Uniform Payroll

June 05, 2009

OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2009-50

TO: All ISIS HR Paid Agencies

FROM: Andrea P. Hubbard
Director

SUBJECT: Employee Name Changes

Please be advised that a corrected W-2 (Form W-2c) is created in ISIS HR when a retroactive name change is made on Infotype 0002. There are situations when the W-2c is required, however many name changes do not actually warrant a W-2c. To avoid unnecessary processing of these W-2c statements agencies are asked to review and adhere to the following guidelines:

1. Always review the employee's Social Security card and ensure that the correct name and spelling are used when completing the hiring action in ISIS HR.
2. Only make name changes in ISIS HR for the following reasons. The Social Security card must reflect these changes.
 - a. Marital status changes (marriage, divorce, annulment, etc.)
 - b. Legal name changes (adoption, naturalization, etc.)
 - c. Misspelled names

NOTE: For items a and b, use the COPY functionality and change the effective date to the 1st day of the pay-period that the Social Security card was verified to reflect the name change. When the name is misspelled upon hiring, the CHANGE functionality should be used to correct the record.

3. **Never make name changes for the following:**
 - a. Change employee's name from upper to lower case or vice versa
 - b. Add or remove punctuation (e.g. period, comma, hyphen, etc.) unless advised to do so by OSUP
 - c. Modify other formatting issues to obtain consistency for all employees

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Infotype 0002 defaults the employee's date of birth as the effective date during the hire action. It is imperative that agency's review the effective date when processing a name change to prevent the creation of W-2c statements for multiple years.

Direct ISIS HR entry questions to the ISIS Help Desk via the ISIS HR Help Desk Ticket located at: http://www.doa.louisiana.gov/ois/service/user_support/helpdesk/helpdesk.htm. For all other questions, contact a member of the OSUP Wage and Tax Administration Unit at _DOA-OSUP-WTA@LA.GOV or (225):

Cindy McClure	342-5346	Wendy Eggert	342-0714
Tiko Ary	342-1651	Tracy Smith	219-0191
Gary Bennett	342-1652		

APH:cdm/ral